

Friends of the Baton Rouge Zoo

Feasibility Study

Final Report

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Schultz & Williams

Schultz & Williams (S&W) is an established consulting firm that provides comprehensive strategies – including planning, development, direct response, interim staffing, and marketing – to nonprofits of all types and sizes across the nation, with a particular specialization on zoos and aquaria.

S&W draws upon our hands-on experience in directly leading over 80 unique planning projects for our Association of Zoos and Aquariums (AZA) clients. Since 1987, the success and integrity of our work and of our team of seasoned nonprofit leaders and experts have been driven by one simple philosophy: management, development and marketing strategies must be fully integrated in order for organizations to achieve financial stability, operational excellence and, ultimately, their mission-related goals.

S&W has extensive experience working with zoos of all sizes across the country. We have helped develop strategic, business, and operational plans for over eighty AZA-accredited institutions, with budgets ranging from less than \$1,000,000 to well over \$50,000,000, and attendance ranging from 75,000 to over 3,000,000 visitors.

Schultz & Williams is headquartered in Philadelphia, PA with operations in Los Angeles, CA and Washington, DC.

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Interview Request Letter

List of External Interviewees

The Friends of the Baton Rouge Zoo (FOZ) retained Schultz & Williams (S&W) in November 2014 to conduct a mini-feasibility study to test the options and opportunities of a significant reinvention of and investment in the current visitor experience including assessing the ideal site location and potential funding structure for the future Zoo.

Schultz & Williams appreciates the opportunity to work with the Friends of the Baton Rouge Zoo to conduct this study. We commend the entire Friends of the Zoo Board of Directors along with the Zoo Executive Director Phil Frost and BREC's Superintendent Carolyn McKnight for their leadership and willingness to engage the key community, political and philanthropic leaders in a conversation about the current and future role of the Zoo in Baton Rouge and the nine parish region as we begin to gauge the community's willingness to support a transformation of the Zoo.

S&W expresses particular thanks to Kaki Heiligenthal, Director of Marketing and Development of the Friends of the Zoo, for helping prepare the S&W team for their meetings and for the scheduling of the interviews that were vital to this study.

The purpose of this feasibility study was to determine the degree to which the Zoo possesses the fundamental requirements for moving forward with this exciting new initiative including: ***the level of community support for a major Zoo renovation/improvement; to what extent and in what nature this support exists; and whether, from a business standpoint, the community sees the Zoo's current location as a viable option for any major future endeavors.***

Methodology

To become completely informed about FOZ's vision for the Zoo, S&W reviewed background materials about the Baton Rouge Zoo and the Friends including:

- Financial information and annual reports;
- Strategic planning documents;
- The most recent facility master plan and supporting materials;
- Operational information including marketing plans, historical attendance data and visitor surveys;
- Membership history; and
- Organizational chart, job descriptions and board structure.

To further enhance our understanding of the Zoo, we traveled to Baton Rouge to tour the Zoo and to gain a better understanding of the Zoo's future direction. During that trip, we had introductory meetings with the FOZ Board of Directors and BREC's Superintendent Carolyn McKnight.

Building upon our baseline understanding of the Zoo, we had regular calls with the leadership of the Zoo to create a project profile that outlined re-imagined visitor and animal experiences for the Baton Rouge Zoo.

Vision Document

S&W and the leadership of the Zoo collaboratively created a white-paper "vision document" that identified and outlined the needs and opportunities of creating a new Zoo concept with a complete transformation of the visitor experience at its current location or a potential new location. The vision document outlined the significant capital investment that would be required for implementing this re-imagined vision for the Baton Rouge Zoo. The elements highlighted in the vision document included:

- Background about the Zoo – History & Success
- The Bold New Vision
- The Strategic Outcomes of a Transformation of the Zoo & Visitor Experience
- The Impacts on Baton Rouge
- The Funding/Business Model

The vision document is included in the body of the report starting on page 10.

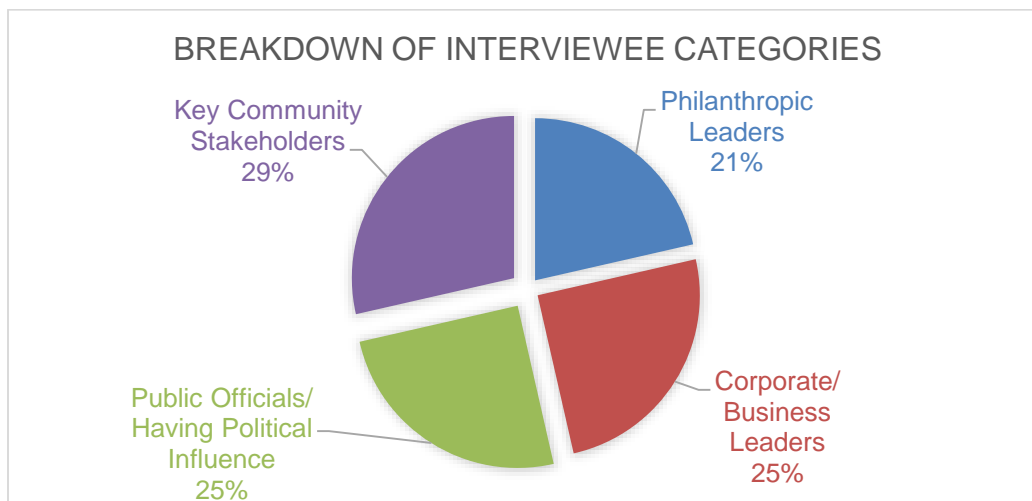
The vision document was used to engage community leaders in a discussion about the Baton Rouge Zoo and was sent by the Zoo with a cover letter from Phil Frost, BREC's

Baton Rouge Zoo Director, Jim McIlwain, President, Friends of the Baton Rouge Zoo Board of Directors, and Carolyn McKnight, BREC Superintendent. The document requested a one-on-one interview with a member of the S&W team. The list of potential interviewees was developed by a Task Force composed of FOZ, BREC and the Zoo leadership. The interview request letter is attached as **Appendix A**.

External Interviews

The Task Force invited over 40 business leaders, philanthropists, and community stakeholders to be interviewed with the intent that S&W would interview 25 individuals over the course of a three day visit to Baton Rouge. In March 2015, S&W Vice President Rick Biddle and S&W Consultant Jill Macauley conducted 28 confidential interviews – twenty-one were one-on-one in-person interviews with seven conducted via telephone interviews.

The interviewees were reflective of the following categories:



As reported by interviewees, about 30% were current or past Zoo members. A list of those interviewed can be found in **Appendix B**.

S&W developed an interview discussion guide to focus the conversations on key issues including:

- Image and awareness;
- BREC, FOZ Board and staff leadership;
- Strength of the vision and outlined outcomes/impacts of a transformation of the Zoo and visitor experience;
- Funding needed and timing of a public and private funding initiative and willingness of the community to support the vision; and
- Other factors that could impact the Zoo's ability to accomplish its vision.

Overview of BREC's Baton Rouge Zoo

History & Mission

The Zoo has a 45-year history of community support starting with a \$750,000 millage to start and build the Zoo in 1965. The community excitement was spurred on by the local celebrity Buckskin Bill. In 1970, BREC's Baton Rouge Zoo opened its doors at its current location.

From the beginning, the Zoo leadership has been dedicated to the highest standards in animal care and zoo operations. The Baton Rouge Zoo was the first zoo in Louisiana to achieve the distinguished honor of being accredited by the Association of Zoos and Aquariums (AZA). As a leader in the zoo field, the Baton Rouge Zoo was accredited in 1977, four years before any other zoos in the state and eight years before such accreditation was mandatory for membership in this prestigious professional association.

Today, the Zoo is now a top cultural attraction in the capital region attracting over a quarter million visitors annually. Beyond being a fun, safe, family-friendly experience, the Zoo has a clear mission to connect people with wildlife through its conservation and educational programs.

The Zoo is very active in conservation programs and fully participates with other zoos around the world in nearly 50 international Species Survival Plans (SSP) for critically endangered species. Three of these SSP animals, the Guam Rail, Arabian Oryx, and Golden Lion Tamarin, have been successfully reintroduced into the wild and represent living proof of the Zoo's long-term commitment of reintroduction to strengthen and supplement wild populations of endangered and threatened wildlife.

The Zoo conducts active outreach and in-house educational programs. These programs are aimed at making the public aware of the problems confronting wildlife of the world. The Zoo's educational programs reach thousands of children in school groups each year.

The Zoo has had a close partnership with the Louisiana State University School of Veterinary Medicine including a vet residency program that has trained a number of vets working for AZA institutions. A range of animal studies are also conducted through other departments at Louisiana State University as well as other colleges throughout the region.

Leadership

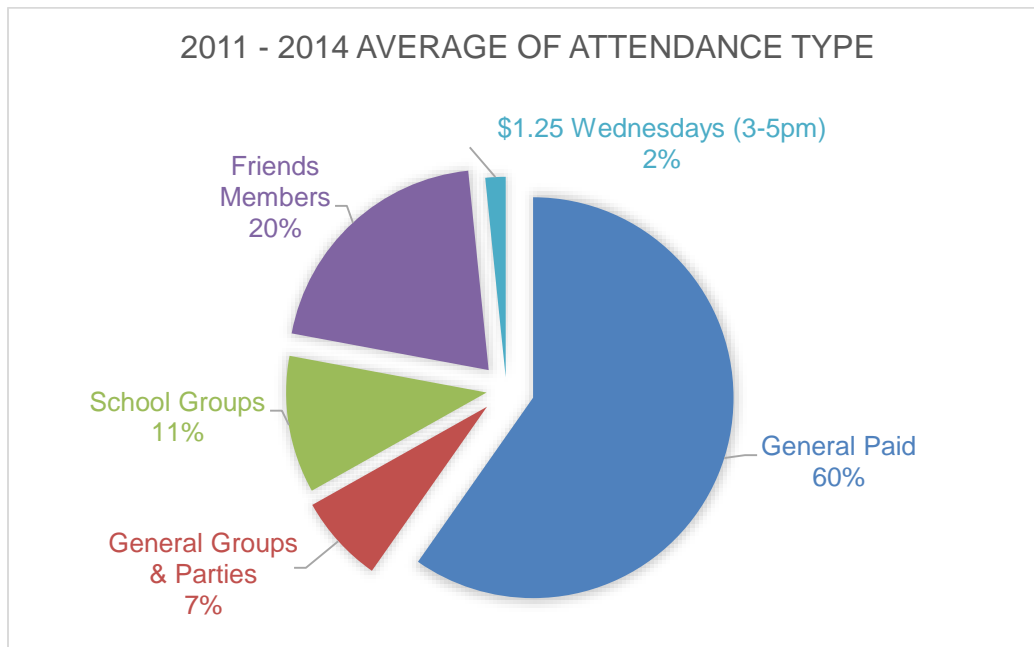
The Zoo is owned and operated by the Recreation and Park Commission for the Parish of East Baton Rouge (BREC), a public government agency. In 2011 the BREC Commission selected a new superintendent, Carolyn McKnight. Carolyn has vast experience in parks and recreation as she has worked for the Dallas Parks and Recreation department and helped to launch a new public-private partnership with the City and the new Dallas Zoo.

The Zoo is also supported by the Friends of the Baton Rouge Zoo, a 501(c)(3) not-for-profit organization. The Friends' mission is to support the Zoo and its programs. The Friends work closely with BREC to raise funds for capital projects, to increase attendance through events, and to promote community involvement. The Friends are managed by a Board of Directors that works in close partnership with the Zoo Director and BREC Superintendent.

The Zoo has had strong and steadfast leadership by its staff. Phil Frost, Zoo Director, has been leading the Zoo for over 17 years. Phil's career has included experiences at several other accredited zoos across the country and he serves on a number of influential boards in the conservation, zoological, state tourism and wildlife sectors.

Attendance

For the past four years after the opening the Zoo's last major renovation, the Realm of the Tiger, the Zoo has been averaging near 250,000 visitors annually.



The Zoo is a very affordable attraction in the community. It has kept its admission fees the same since 2012 and strives to be below the average zoo adult admission fee to best serve the residents of the Capital region. The current adult admission rate is \$8.25, which is well below the average adult admission fee of \$10.25 that is charged at similar sized AZA zoos based on total annual attendance. The Zoo does also offer a \$1.25 admission fee every Wednesday evening from 3:00 to 5:00pm to promote accessibility to all within the community.

Operating Model & Funding Composition

The Zoo operates under a successful public/private operating model with a balanced budget supported by earned revenues, contributed revenues from the Friends and community support through BREC tax initiatives. The Zoo has a \$5.5 million operating budget including the salaries and services that are provided by the East Baton Rouge Parish through BREC.

The following is the average breakdown of the Zoo's operating revenues:

- Earned and Contributed Revenue = 53%
- BREC Support & BREC Tax Revenue = 47%

The allocation is consistent with other AZA zoos of similar annual attendance and operating under a public/private partnership.

The AZA did an economic impact study of the Zoo. Based on employing over 100 employees, generating 250,000 visitors annually, and spending \$5 million on goods and services, the Baton Rouge Zoo contributes approximately \$17.67 million annually to the local economy.

Vision Whitepaper Document Tested in Interviews

S&W and the Zoo's leadership created the new vision statement for the Baton Rouge Zoo. The vision document was sent in advance to all confirmed interviewees. During the one-on-one interviews, the new vision was tested for interviewees' reactions to how compelling they found the concepts, how feasible they believe it was, and if they would support this new direction.

The Vision for the New Baton Rouge Zoo

Uniquely Baton Rouge—A Great, New Zoo for our Nine-Parish Area

The leadership of BREC's Baton Rouge Zoo has a vision to completely re-imagine the current Zoo through a transformation of the visitor experience into a zoological journey that offers our city, residents, families, visitors and guests a fun, unique zoo adventure.

The Zoo, Friends of the Baton Rouge Zoo Board of Directors, and BREC leadership are united and determined to give Baton Rouge the great zoo that it deserves, establishing it as a key cultural cornerstone of this growing and dynamic city. Our city should not settle for anything less.

Armed with the vision to provide Baton Rouge with a great zoo, one that is uniquely special for our city, much planning and consideration has gone into developing what hopes to be a complete transformation of the Zoo. Visitors will be engaged through interactive, highly-personalized wildlife experiences that are compelling and memorable.

Only a lucky few can afford to take a safari in the native lands of our animals, so we are bringing the experience to our community to discover, explore and connect with wildlife right here at Baton Rouge's new Zoo.

Baton Rouge's new Zoo will be the entertainment and educational destination for residents and tourists in the Baton Rouge region. Our region deserves a new and great zoo!

A Destination for All in and Around Baton Rouge

The new Baton Rouge Zoo will provide far more than an opportunity to view animals. The vision for the new Zoo, which is modeled after the leading zoo trends in the nation, is to offer fun, creative, immersive experiences that have the power to deliver a compelling message about preserving wildlife in wild places for a public that is increasingly isolated from nature.

This great, new Zoo will serve as a living classroom where visitors learn about real-life conservation and research programs – both at the Zoo and in the wild – through interactive engagement with keepers, docents and Zoo staff.

Conservation is an ever-changing need in our society. Educating our youth, families and elders will provide them with the tools and/or knowledge to help increase endangered species populations, decrease waste, conserve energy and make our world a better and safer place to live. The new Baton Rouge Zoo will continue to expand our role in community education and strive to serve as an educational hub from pre-school age to school age to those pursuing advanced degrees.

As a cornerstone of the new Zoo, the leadership plans to build a Conservation Learning Center, which will be the site for summer and holiday camps, overnight programs and school group activities. The Baton Rouge Zoo strongly believes in the philosophy of the African ecologist Baba Dioum:

“In the end we will conserve what we love, we will love only what we understand, and we will understand only what we are taught.”

Our New Zoo – A Whole New Adventure

The goal of the new Zoo experience is to take visitors through a multi-dimensional adventure to visit exhibits that are naturalistic and make visitors feel as if they have traveled into the wild. Learning from the trends among zoos today, the new Zoo's exhibit will connect the visitor to the animals through up-close perspectives and the opportunity to engage with the animals.

Imagine feeding a giraffe a lettuce snack, having a lemur jump next to you, or even having a bird land on your shoulder.

No longer will the Zoo visit be experienced just by foot – the wild and fun experience hopes to include:

- Ziplines and adventure courses;
- A train ride to take visitors behind the scenes;
- A bird's eye view of the animals riding a sky lift over the Zoo;
- Cooling off like elephants in wildlife-themed splash pads and water rides;
- A carousel made of endangered species; and,
- Other unique venues that give our visitors 360 degree views of wildlife.

Young children are curious and eager to learn about the natural world. Climbing, building, splashing, play-acting and daydreaming are fun and important for children's social, intellectual and physical well-being.

When children play and explore in nature, they become more vigorous, cooperative and imaginative learners.

The adventure will continue at the new Baton Rouge Zoo as the visitor dines and shops. As visitors dine, their tables will overlook exhibits to create the feeling of sharing a meal with an animal while introducing them to the highest levels of eco-friendly restaurant practices. The shopping adventure continues the experience, with the opportunity to share the culture of different lands while building on the conservation message of the surrounding exhibits and overall mission of the Zoo. The visitor amenities have an extraordinary opportunity to help teach how conservation and culture interact and affect the world we share.

A Wild, New Animal Exploration Experience

The zoological adventures at the new Zoo will offer a complete transformation for our visitors as they experience these key exhibits and experiences:

Life in the African Savanna – Elephants, Giraffes, Zebra, Rhino & Birds

A dramatic mixed-species exhibit built with rolling grasslands much like they would exist in the wild.

Elephant Oasis

Through the passion of our community, elephants have made their home in Baton Rouge for decades. Elephants are a flagship species for our Zoo; therefore, we are building them a brand new home. Specially designed for our elephants, this oasis will offer a stimulating, updated environment for the elephants by enhancing and expanding their habitat and enrichment. The Elephant Oasis provides wonderful viewing areas for visitors, where they can see the animals at rest and at play and participate in educational lectures and demonstrations.

Giraffe Encounters

With an African-themed feeding platform that reaches out into the African Savanna, visitors will not only be eye-to-eye with these mighty giants, but they will also be able to touch, feel and feed the giraffes.

An Asian Escape – Tigers, Primates, Antelope & Birds

As visitors travel throughout their new Zoo journey, they will be immersed in the sights and sounds of Asia and see a range of animals from small primates to different wild cats to many types of hooved animals. This exhibit will build on the culture and experiences in the currently accessible Realm of the Tiger.

The South American Cloud Forest Adventure – Jaguars, Bears, Primates, Birds & Other Small Mammals

Visitors to Baton Rouge's new Zoo can embark on an enchanting journey through the forests of Central and South America in this exhibit, which will be filled with fascinating creatures. The scenery will be set with dozens of unique, beautiful and interesting plants, trees and shrubs. Cloud forests are higher ground areas covered in moisture and mist. These "islands in the sky" are filled with several species that are not found anywhere else in the world. Visitors will have to keep their eyes and ears peeled for all the wild animals in the Cloud Forest.

Walk-Through, Free-Flight Aviary Experience

Visitors will be invited into a large walk-through exhibit which creates an experience unlike any other – an intimate, up-close interaction between visitors and free-flying birds, including opportunities to hand-feed and meet many species from around the world.

Wild Louisiana: Atchafalaya Basin – Cougars, Bobcats, Bears, Birds of Prey & Aquarium

The Atchafalaya Basin is the nation's largest river swamp, stretching across 14 parishes in south-central Louisiana. It is among the most culturally-rich and ecologically varied regions in the United States. In the nearly one million acres in the Basin area, it is the most active swamp/marsh ecosystem in the northern hemisphere. It is home to thousands of species of bird, fish, and animals. At the new Zoo, visitors can learn about this critical ecosystem and animals including the many endangered species in Baton Rouge's backyard.

Many more wildlife experiences are envisioned for the new Zoo, which will showcase animals from around the world.

As the facility master plan is developed for the new Zoo, every exhibit will be designed and built with our animals and guests in mind. Additionally, all exhibits will be built to meet, if not exceed, the Association of Zoos and Aquariums' (AZA) guidelines. These are standards the Baton Rouge Zoo has practiced and adhered to since 1977 when it became the first Zoo in Louisiana to gain accreditation and the 19th Zoo in the nation to achieve this distinction.

Supported by strong community partnerships, the new Baton Rouge Zoo will remain dedicated to being affordable, safe and accessible for all. As our Zoo is enhanced physically, careful consideration is made to design the Zoo to allow for easy navigation.

No longer is the Baton Rouge Zoo just a place for day-time visits. The Zoo offers businesses a progressive location for innovative corporate retreats. The new Zoo will be designed for fun-loving couples looking for a unique, memorable wedding venue. Additionally, zoos across the country are also creatively responding to the growing request to go beyond great group space by adding lodging that takes the experiences of the day into the overnight. Mission-driven designs of tents, lodges and more bolster the role of the Zoo as a tourist destination. As the vision for the new Baton Rouge Zoo is further developed through facility and business planning, lodging will be considered for the Zoo.

The collective leadership of the Baton Rouge Zoo feels it is critical that the new Zoo be created in close partnerships with our community. Strong support for the new Zoo to create synergistic relationships through partnerships with fellow cultural attractions, universities, corporations and government allows the Zoo to help generate a greater educational, conservation and economic impact for our region. The real value of the new Zoo will be in future synergistic relationships that will make it a true civic asset.

The Impact of a New Zoo

With our bold vision, leadership and partnership with BREC and the Friends of the Baton Rouge Zoo, we are poised to leverage the momentum created and enthusiastically embrace a vision of a zoological destination that is uniquely Baton Rouge with a fresh, compelling approach to wildlife experiences.

Baton Rouge's new Zoo will contribute to our region's future. Strengthened by synergistic relationships with our state, city, corporations and fellow organizations, this transformation will position the Zoo as a vibrant destination for generations of visitors, and enhance the quality of life in Baton Rouge through education and tourism.

Once completed, the new Zoo will attract over 375,000 estimated visitors annually; generate over \$10 million annually from its operating programs; leverage an estimated \$24 million in annual economic benefits; and generate over \$330 million in one-time economic benefits from its facility investments to create the new vision.

\$110 Million Investment Together as a Community

Just as we have turned to the community in the past to help us expand and improve, we will once again look for the support of our communities to make this grand vision a reality. BREC will not only have to explore the need for a new funding initiative, but will also look at all public stakeholders including East Baton Rouge Parish/City of Baton Rouge and the State of Louisiana.

In an effort to leverage public support, the Zoo strives to raise \$25 million in private support in order to complete this transformation. We hope that individuals, foundations and businesses will once again invest in the Zoo's growth as a way of supporting animal conservation and the cultural and recreational life of the Baton Rouge region.

A most ambitious vision, this transformation of the Baton Rouge Zoo will bring together best practices in animal management, naturalistic environments, visitor engagement and public education. Baton Rouge's new Zoo represents the significant commitment to Baton Rouge as a center for conservation and public education excellence. Best of all, it will engage hundreds of thousands of visitors in a compelling and memorable wildlife experience – one that is uniquely Baton Rouge.

Summary of Findings

The following is a summary of our findings from conducting 28 one-one-one interviews with community stakeholders, public officials, corporate/business leaders and philanthropic leaders. The twenty-one in-person and seven telephone interviews lasted between 45 and 60 minutes on average. All but six interviewees read the vision document in advance of the interview. Each interview began with an introduction to the process and overview of the vision (this was more detailed for those who had not read the vision in advance). A discussion guide was used to facilitate the conversation, but was not shared with the interviewee.

Image & Awareness of Zoo

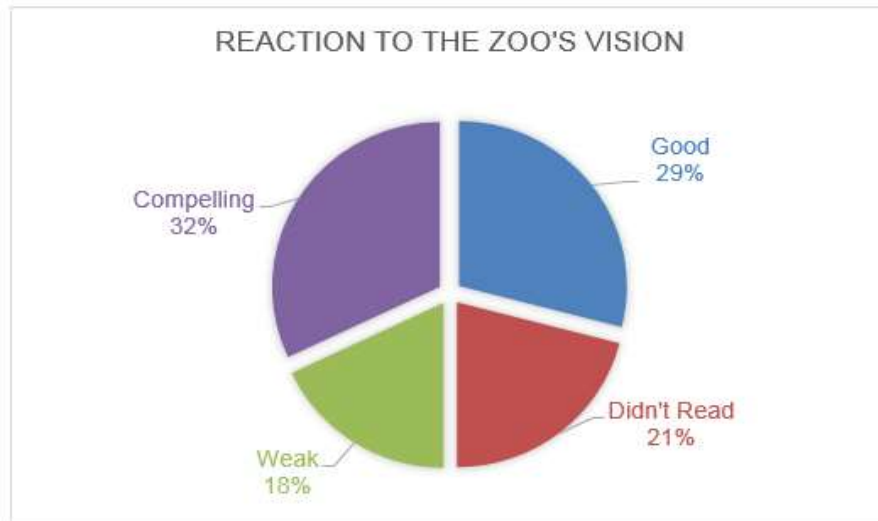
- The majority of interviewees were not regular Zoo goers as about 30% of interviewees had visited the Zoo within the year with nearly half of the interviewees having been to the Zoo within the past five years.
- Interviewees who spoke to their recent visit and experience shared that they had an average to positive experience at the Zoo.
 - *“I do think of a zoo as a community asset. I believe wholeheartedly in learning through exposure. It is important for children to be exposed to wildlife, especially if we want them to be advocates for conservation. I also appreciate the family time that a zoo offers. Our Zoo is more affordable than people think.”*
 - *“I like the Zoo. The people are nice but it is obvious that the Zoo needs repairs and renovations. I feel like it really needs to be brought up to speed. The really great thing about the Zoo as it is today is it is spacious.”*
- The perception of the Zoo in the community seems to be as a place for parents and young children. The Zoo is not perceived to attract a wider range of audiences.
 - *“I know that kids love our Zoo, but it has nothing for adults without children.”*
 - *“I think other BREC parks are more popular. The Zoo is only relevant to parents with young children.”*
- Over half the interviews revealed that the Zoo is perceived to be an older, dated facility in need of upgrades. The interviewees shared that they thought the community is aware that other zoos both regionally and nationally have more engaging experiences and higher quality exhibits.
 - *“I have enjoyed my experiences but it hasn’t changed since I was a kid. I would describe the Zoo as stale, old, small and in a bad location. The*

Zoo location, unfortunately, is not where Baton Rouge has grown with the exception of Zachary.”

- *“I love zoos, but our Zoo is in need of help. As it exists today, it is a place that has not caught up with times.”*
- Some interviewees called the Zoo the “Baker Zoo” as it is near the beginning of the Baker city limits, and many commented that they felt it was not in a convenient location.
- In general, the interviewees felt that the Audubon Zoo in New Orleans had greater awareness and was perceived to offer more robust visitor experiences to the residents of the Baton Rouge region. Interviewees were aware that, with the recent marketing of Audubon Alive, there had been significant awareness building of the Audubon Zoo in the Baton Rouge region and among a percentage of New Orleans residents that have moved into South Baton Rouge after the hurricane in 2005; therefore, there is a heightened awareness of the Audubon Zoo.
 - *I guess I would call [our Zoo] adequate. The Audubon Zoo is much better and if you have been to Audubon, your perception of the Baker Zoo is tainted.”*
 - *“While I have not been, I have heard that it is below average. We are actually members of the Audubon Zoo.”*
- When asked about the role that a zoo can play in a community beyond serving as entertainment for young families, the majority of the interviewees had not thought of the Zoo as a larger community asset related to education, conservation, quality of life, economic development and synergistic partnerships.

Response to the Vision Document

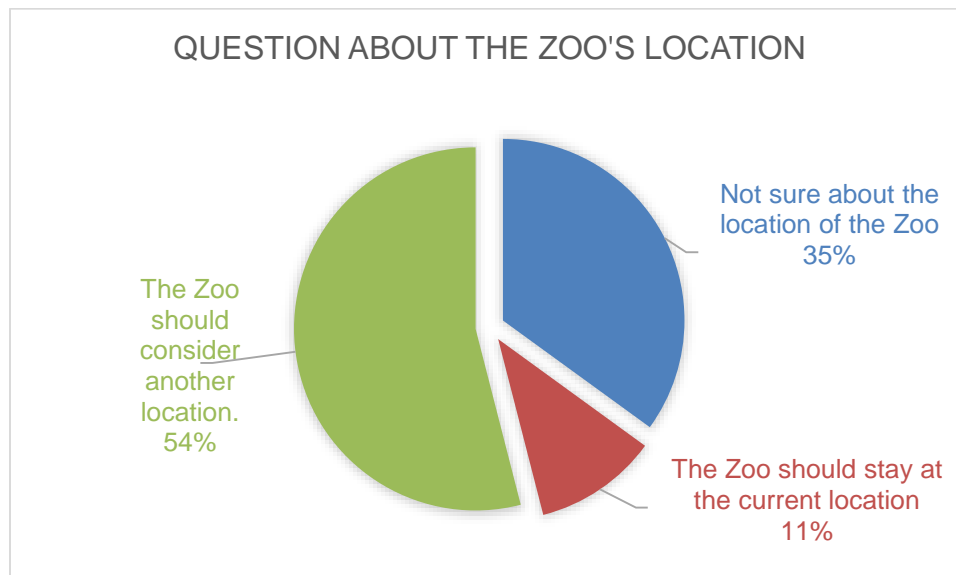
- Interviewees' reaction to the vision for a transformation of the Zoo and the visitor experience as outlined was as follows:



- *"Let me be clear – I love this idea."*
 - *"The Zoo has laid out a really compelling vision. I am very impressed; this is what the City should have."*
 - *"I am so glad to see the Zoo thinking bigger than elephants. I love how the vision was based on the leading zoos, but has Louisiana elements."*
 - *"I am a believer in all that a great zoo provides to a community. Zoos are great amenities for communities. Yet, we have Audubon and I am not sure that Baton Rouge needs it."*
 - *"Transforming the Zoo is an important story to tell. They will not be the same old Zoo; that is something that BR needs."*
- Interviewees responded optimistically to being asked if they felt there would be interest and willingness within the community to support the new vision. Over 80% of interviewees felt that there was high probability of the community supporting the vision.
 - As interviewees learned more about the vision during the interview discussion their excitement about the vision increased. Of those who didn't read the case (6 interviewees) all but one agreed that the vision was good to compelling.
 - *"Initially, I would just have said no it is not possible to get the community support. As we talk, I am thinking this could be really impactful for our community but it has to be done right with the right people, right focus and right relationships."*

- *“BR is a healthy community and will support this. Yes, there are lots of needs but a zoo is an important element/fabric of a dynamic community. Right now, the only other option/alternative for children in BR would be the new Children’s Museum – the Zoo is for families and children so, yes, it is important.”*
- The main concern of interviewees was about the competition for funding in light of many critical needs in Baton Rouge such as education and healthcare. As noted later in the findings, 81% of interviewees felt it was potentially possible to raise the needed funds for the Zoo’s vision.
 - *“The timing of this project is important. Where does this fall in the community’s priorities? I would think that it is a high priority with the right leadership.”*
 - *“I question is if the Zoo is a priority for the community right now. There are a lot of competing needs such as education, traffic infrastructure, developing the downtown and other cultural funding needs like Knock Knock.”*
 - *“I do believe the community would come to a zoo that is like what is described in the document but I don’t know if they will support a tax initiative or if the bandwidth is there for that much private support.”*
- The interviewees found the following elements of the vision to be compelling:
 - Baton Rouge is a city on the rise and people want it to become known as a great city. A great city deserves a great zoo.
 - *“It is too often that Baton Rouge settles for just so-so and says it doesn’t matter we will never be New Orleans. I want to see Baton Rouge go beyond that and have a big vision.”*
 - *“I think that every cool community has a great zoo. The Zoo needs to explain its role in our community.”*
 - Interviewees were very excited about the potential transformation of the Zoo offering a new level of big and bold animal and visitor concepts that are highly interactive and engaging.
 - In a region with great natural habitats and wild spaces, the Zoo should continue to create awareness and education about conservation both locally and globally.
 - *“I would recommend that it really highlight the local species and local conservation to help people learn about their backyard. Doing that helps the Zoo create a more significant place in our cultural heritage. The new Zoo can make the Baton Rouge Zoo a true asset for our state.”*

- *“Connection to education and learning are key and critical. It is important to promote the tremendous learning opportunities that the Zoo would offer.”*
- The vision explains how the Zoo will develop and foster relationships with colleges and universities, conservation organizations/projects including the Water Institute and educational organizations to help enhance the overall impact through synergistic partnerships. Interviewees liked how the vision outlined concepts that took the Zoo to being “more than a zoo”.
 - *“It will be important to link the Zoo’s role in the community to economic impact. People want to understand how it will relate to other sectors like education, LSU, development and tourism.”*
 - *“Having a partnership with LSU is a great idea. It adds credibility, adds students to its audiences and offers opportunities for students from education, vet tech, vet services, hospitality; business practices and intelligence to use the Zoo as a living classroom.”*
 - *“In particular having partnerships with places like the Water Institute will be very popular. The new Zoo really needs to communicate how it is linked to the community through partnerships.”*
- Interviewees were asked if the current location allows the Zoo to best serve the community. The following is a breakdown of their responses:



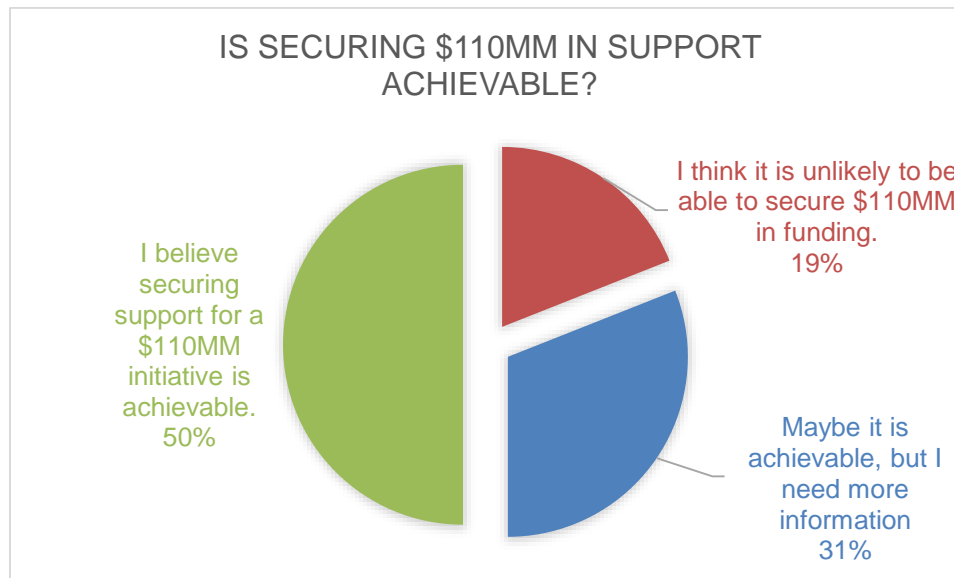
- 54% of interviewees thought the Zoo should consider another location. They also felt strongly that the Zoo needs to have a detailed business plan that outlines the full impact of the capital investment and its sustainability. The 35% of interviewees that were not sure said they

would need more information to make that decision. Only 11% of interviewees said that the Zoo should not move.

- Many interviewees valued the idea of the Zoo developing greater partnerships with other organizations in the region and believed that a more central location would be critical to developing those relationships.
 - *“I do not think that the current location of the Zoo allows it to best serve the community. Yes, I think if we are going to invest we should move the Zoo. I am not sure about the ideal location, but it should be centrally located. As I read the document, I thought to myself about the Zoo needing a new location. Let’s think about a fresh start. It would be great to truly create a destination linked with other museums or conservation projects like the Lakes Project.”*
 - *“I think you need to move the Zoo from its current location to fulfill this big vision. The Zoo needs to be in a different location to create important relationships with the community. Leveraging those relationships is important in creating this new Zoo and for sustainability.”*
 - *“I like the idea of the Zoo being centrally located. If it were closer to LSU, there would be potential for much more expansive partnership.”*
 - *“Baker is not the right location. Being all the way up there, I don’t think it is even thought of as the Baton Rouge Zoo. I call it the Baker Zoo. The biggest reason it would need to move is because of linking it with the educational programs. I would love to see a school at the Zoo and that can’t happen in Baker.”*
- Interviewees did share that their support and investment would likely increase significantly if the Zoo were to relocate to a more central location.
- Interviewees that were concerned about the proximity of the Baton Rouge Zoo to the Audubon Zoo were not aware of the large number of successful models of two zoos being within 75 miles of each other: Seattle/Tacoma, Dallas/Fort Worth, Detroit/Toledo, Orlando/Sanford/Melbourne, and many others.
- Based on interviewee responses, the general consensus is for the Zoo to continue to assess site and location options to best serve the community.

Funding Potential

- 50% of interviewees believed that raising \$110MM through multiple funding sources is achievable, 31% said maybe, but they needed additional information related to leadership and timing, and 19% (5 interviewees) thought it would be unlikely. The breakdown of interviewee responses on the funding potential is the following:



- Interviewees felt good about BREC's reputation and involvement as it builds confidence and support for the project.
 - *"BREC does have a wonderful reputation in this town. They have done good work and maybe leveraging BREC will help the Zoo get the funding."*
 - *"BREC has a great track record. It would appear doable."*
- Interviewees did think that raising the private funds first and then asking the voters to pass a new tax initiative was the better strategy. There were several interviewees that recognized that the timing and sequencing of the funding requests from the different sources would have to be very strategic.
 - *"I do think it is possible, but many factors would impact that. I think the \$25MM needs to be raised privately first."*
- Interviewees felt strongly that, if the Zoo engaged the right people and leadership to lead this project in the community, the likelihood of the project's success increases significantly.
 - *"This is a big number. All of the right people need to be involved from the ground floor to make this become a reality. The Zoo needs to engage those key influential community leaders."*

- *“It is possible, but it could be challenging. They need the right leadership involved.”*
- Interviewees shared that they knew of competition for private funds for other major capital projects and that the Zoo needs to be aware of this as it begins to fundraise.
 - *“We are raising \$300MM for a Catholic hospital (Our Lady of the Lake Hospital). Phasing this project is an important strategy.”*
 - *“It might be doable. There is competition right now for funding with the Lakes Project and Children’s Hospital.”*
- Interviewees had the following feelings about successfully passing a BREC tax initiative:
 - Interviewees felt that BREC has a great reputation, which will be able to be leveraged to build tax payer support.
 - *“BREC has a great reputation and has been a good steward of the public funding they have received. I would recommend that part of the messaging focus on being transparent and helping the people understand exactly how this will impact them (i.e. \$2 per month).”*
 - *“BREC is beloved in the community, which will help get a vote passed.”*
 - Interviewees feel that significant investment will need to be made in gathering community input prior to vote and clear, consistent detailed messaging will be needed.
 - *“It will be critical to have private support first. I would think that the Zoo needs to make a significant investment in parish surveys before going out for a vote. Also BREC is viewed as having money, which might also challenge getting the support.”*
 - *“I think the philanthropic dollars would have to be raised first.”*
 - Ten of the interviewees were also concerned about the tax-adverse nature of the community and the community’s track record with not passing other initiatives.
 - *“It will be very difficult to get another tax initiative passed. People will have to be convinced of the value of the Zoo. Right now, people do not value the Zoo enough to pay more taxes for it.”*
 - *“There are members of our community that are very much against any tax initiative. I would think it could pass. BREC would have to demonstrate the business plan and sustainability of the*

project and be very upfront about if additional tax initiatives would be needed for operations.”

- Interviewees were generally not optimistic about securing either State or City funding. The two ways interviewees saw opportunities to secure public funds was after new administrations at both the State and City levels were in place and through partnerships with education, universities, Department of Wildlife and Fisheries and tourism. All agree that “timing” would be critical to successfully obtain funding from the State and the City.
- The majority of interviewees felt that raising \$25MM privately would be the linchpin to the success of the project and would have to be done before the tax initiative and other public dollars could be secured. The majority of interviewees felt it was possible to achieve the funding goal, but that was contingent on engaging the right leadership, identifying lead seven-figure donors and promoting the project’s big and bold vision.
 - *“My response is “yes, [to raising the private dollars] but...”. Raising this type of money will require the right people to be involved and having them lead the bandwagon.”*
 - *“I’m not sure. That is a big number but it is also a big compelling vision. Again, with the right leadership behind this, it could be done, especially if it is done in phases.”*
 - *“We have seen organizations struggle to raise half that amount, but then others raise that easily. Yet, the only way people will invest is if this Zoo is completely different from the Zoo experience of today.”*

Cultivating Constituencies

- The interviewees had the following thoughts on what cultivation and messaging would be needed to secure the public’s support for this project:
 - The awareness of the Zoo in the community will need to be higher. The Zoo will need to invest in making itself top-of-mind in the community by taking its message on the road, creating a larger presence at other community events and greater marketing about its role, especially in education and conservation.
 - *“I am personally ignorant about the role that a Zoo can play in a community. I know I would need more understanding about our Zoo and what it could be. Therefore, I would think that the Zoo needs a campaign to educate the community before doing anything else.”*
 - *“The Zoo needs to go on the road and give it a face in the community. The awareness is so low about our Zoo. Then, the Zoo really needs to spend significant time working with the public*

on getting their input and thoughts about its future. The Zoo has to do more to create a relationship with the community than just put up billboards.”

- The message about the big, bold vision and the project has to be clear, consistent and transparent from the beginning. The community will want to know that there has been significant investment made in gathering their input.
 - *“People need to have confidence that their experience is going to jump from C level experience to an A level experience.”*
 - *“BREC needs a compelling business plan for the new Zoo. Where is the best location that provides the highest return? What does the Zoo become? What does this community get from a \$110MM investment?”*
- The community will need to have how the new transformed Zoo is critical for Baton Rouge clearly explained. It will be important that they understand how it enhances the quality of life for the region and is linked to economic development. It will also have to be clear in how the new Zoo is linked to promoting and enhancing educational efforts in the region.
 - *“We are the capital city of Louisiana for goodness sake. It is time that we started investing and making our city great. The investment in the Zoo should be spun to show it is a civic initiative.”*
 - *“It will be very important that the message is more than ‘this is just the right thing to do’. We need to explain why this is a priority to our city.”*
- The vision must also differentiate Baton Rouge’s new Zoo from Audubon Zoo and highlight how the new Zoo is uniquely Baton Rouge.
 - *“It will be important that the Zoo is leveraging education, conservation, entertainment and hospitality, but not duplicating what we already have in Baton Rouge or what is in New Orleans. Collaboration is the key.”*
 - *“If people see this as the same as what is in Audubon, they will not support it.”*
- Voters will be looking for a clear understanding on how the tax money will be used and how the Zoo will have a sustainable operating model.
 - *“The Alive concept was not good. That could still be a negative if this new initiative that is BR-driven is not properly communicated.”*

- *“It will be very important for clear, consistent and transparent messaging.”*
- The interviewees had the following thoughts on what cultivation and messaging would be needed to make the Zoo a greater philanthropic priority and allow the Zoo to raise at least \$25MM in private contributions:
 - The Zoo will need to build awareness in the philanthropic community because most donors do not have a relationship with the Zoo. Having the right leaders involved with the Zoo will be key in creating the excitement about the vision and confidence in the project.
 - *“The right leadership is key to making this a priority in the donor community.”*
 - *“There is a lot of wealth in this community and the wealth continues. There is a lot of competition for major donors. I am not sure any of the key donors in this town have an affinity for the Zoo; therefore, there would need to be a lot of work to build that affinity before they could start soliciting.”*
 - Major donors look for projects that leverage their impact; therefore, the partnerships the Zoo develops will be critical. Donors will be looking for the Zoo to be linked to the community on a larger scale including expanding their partnership with LSU. This is also critical because there are several major needs and projects such as the Lakes Project and Water Institute.
 - *“The Zoo needs more visibility. That visibility will help make it a greater priority. I would recommend that the Zoo work really hard to find and secure the right partners. The Zoo needs to be integrated through partnerships and perhaps location with the Baton Rouge urban development plan. I would think that LSU is a smart way to go in terms of partners. I would also link the Zoo to the animal shelter.”*
 - *“People need to understand how the Zoo is linked with the community on a larger scale.”*
 - *“The key pieces to getting funding for the Zoo would be partnerships with the right organizations, especially the school districts and relating the Zoo’s educational mission to STEM/STEAM and the local curriculum.”*
 - Major donors will be looking for a viable and sustainable business plan to understand ensure their gift will continue on for years to come.
 - *“Major donors will need to know the measurable impacts and expectations of the results of having a new Zoo in Baton Rouge. They will need to better understand the economic impact. The Zoo will need to have a business model that it is net positive or*

at least net neutral. Partnerships will be viewed as very important to funders.”

- *“People want to know this new Zoo will be sustainable.”*
- Major donors will desire understanding about the location and want to ensure that the Zoo will be investing in the right location. There was clear sentiment from interviewees that they were unlikely to support the project at the same level if the Zoo remained at its current location. They would be more likely to make significant investments if the Zoo were to find a more central location to better serve the community and more likely to secure synergistic partnerships.
 - *“If it remains at the current location, there will be no support. If it is moved south of the City and offers a bold concept, we will support it and bring new/additional dollars to the table in support of this initiative.”*
 - *“The location will affect the level of support and I think many will agree that they don’t want to support it in the current location.”*

Leadership

- BREC is a respected resource as its public park and recreation facilities and programs throughout East Baton Rouge Parish are highly utilized and valued. BREC also has a good reputation with voters because of its dedication to staying true to its promises and completing projects on budget and on time.
 - *“BREC gets high marks for quality and has a strong name recognition/awareness in the community.”*
 - *“BREC is known for an “on time; on budget” philosophy.”*
- Carolyn McKnight, BREC’s Superintendent, while relatively new to Baton Rouge has successfully become known in the community and has a positive perception. Interviewees that know Carolyn feel strongly that she is asset to BREC, a good leader and has successfully engaged with the community.
 - *“Carolyn is a good listener; she is a leader. She is the reason that I am involved with other organizations.”*
- Those who know Phil Frost speak to his knowledge as a zoo-industry and management expert and his ability to engage people in learning about the Zoo.
 - *“Phil did get me excited with the new ideas he has for the Zoo. He did a good job selling it.”*

- The Friends of the Zoo Board of Directors is made up of members both known and unknown in the community. Interviewees that felt they could speak to the Board members' ability to lead the Zoo through a major transformation felt that additional high-profile philanthropic leaders and community leaders would be needed to make the vision a reality. The interviewees saw this project as a growth opportunity for the Board.
 - *"I know a handful of members, but the Zoo really needs to build a Board with the next generation of big thinkers. The Board needs to own the big, bold new vision for the Zoo and be the spokespersons for it."*
 - *"The Board would need to be strengthened to lead this transformation."*

Recommendations

Based on our interview findings, our discussions to date and our experience with working with leading zoological and cultural institutions, Schultz & Williams recommends that Friends of the Baton Rouge Zoo move forward with the next steps outlined below for implementing its vision for the Baton Rouge Zoo. This feasibility study shows a willingness to support the vision for a transformation of the Baton Rouge Zoo and the visitor experience.

We believe it is important to recognize that this study should be seen as the start of the conversation with the community. There will be significant work that will require completion including conceptual facility master planning to further refine the vision of the Zoo; analyzing the best site location and land use; gaining additional community input; and building awareness of the Zoo in the community before the Zoo can really begin seeking funding. As planning relates to the Zoo's location, a land donation could heavily influence a decision to relocate the Zoo; it would also help to secure both philanthropic contributions and support for the BREC initiative.

In light of the planning work that needs to be done, the key factors critical for successfully moving this initiative forward include developing:

- Influential and willing volunteer leadership;
- Greater awareness and understanding about the role of the Zoo and its impact on the community;
- A clear and bold vision backed by a compelling case for support;
- A cultivated constituency and the willingness of that constituency to contribute; and,
- Staffing and infrastructure to support a community-wide cultivation and a major fundraising effort.

We were very pleased to see the excitement that the feasibility study generated both during the interviews and in follow-up conversations. With the momentum generated about the Zoo's vision, we recommend strongly that the Friends of the Zoo Board of Directors leverage the momentum by engaging actively in more planning and continue proactive engagement with the community's leadership.

Below are our recommendations on how to continue to move the process forward to make the Zoo's vision to completely reimagine the Zoo and the visitor experience a reality.

1. Leadership Identification & Cultivation

The feedback gathered from interviewees had a very consistent theme around leadership. The consensus from interviewees was that the success of this initiative centered around having the right individuals involved and engaged in leading the implementation of the new vision.

With the size and scope of this project, our recommendation is that the Zoo look to develop a leadership group to serve as a dedicated force in addition to the current Friends of the Zoo Board of Directors. We recommend the Zoo identify five to eight of the most influential community and philanthropic leaders to guide this initiative and be engaged with the Zoo to form the “Steering Committee”. The Steering Committee, comprised of “the five to eight stakeholders” should be highly visible, highly respected leaders in the community that have a history of engaging others with major community projects. The individuals recruited to be part of the Steering Committee should be involved from the early stages of planning to ensure complete buy-in, which will help develop them into active advocates for the project, especially when this bold new project begins its fundraising phases. We suggest one or two FOZ Board members be included in the Steering Committee to serve as a liaison to the Board. The Steering Committee should be managed by and report to the Zoo Director/Executive Director of the Friends, Phil Frost.

Additional sub-committees could be developed as the project develops and as appropriate to work on selected elements of community engagement (i.e. gaining political support, gaining neighborhood/parish support, building relationships with universities and educational organizations, building relationships with conservation organizations, and building relationships with the tourism industry).

Volunteer leadership will need clear job responsibilities, talking points, communication and marketing collateral, regular contact, clearly assigned tasks and staff follow up on their tasks and ongoing support and resources. It is important to note that even the best committees don't drive their own activity; they must be strategically led by Zoo leadership and staff.

While, we are recommending that a project Steering Committee be formed to lead this project, the Friends of the Zoo Board must be active supporters and advocates. The Board will need to be viewed as 100% behind the Zoo's vision both philosophically and financially.

In brief, the responsibilities of the Board should be as follows:

- Serve as ambassadors for the Zoo and the project.
- Give generously based on individual means.
- Help identify potential donors.
- Participate in cultivation events.
- Be involved in solicitations as appropriate.

- Report on competing funding projects in the community.

It is important that the Board be trained on how to help manage and implement this project, kept abreast of the Steering Committee work and be given message points on how to share the Zoo's vision with the community.

Continually, the Board and staff should be looking for new Board and Steering Committee prospects. Annually, evaluation by the appropriate Board committee of the skills and abilities of the Board members will help to maintain the energy and effectiveness of the Board as a whole.

2. Vision Development & Master Planning

The vision for the transformation of the Zoo and visitor experience was strongly supported by the feasibility study. As interviewees engaged in the conversations during the interview, over 80% of the interviewees became increasingly excited. Most of the interviews ended with interviewees expressing the desire for the Zoo to continue planning and working towards its new vision.

This study was executed in a format that presented a vision that was just a preliminary explanation of what might be imagined. Now, the Zoo needs to engage a Zoo architectural and planning firm to develop and formalize a detailed facility concept plan around the new vision with input from the Steering Committee.

The following are the key next steps in planning:

- Engage a zoo architect in a planning charrette to develop a concept master plan that is not site specific to illustrate the new vision of the Zoo. This process should be completed in less than three months. This illustrative plan will serve as an important tool in helping the Zoo further promote its vision and help community leaders visualize what a transformation in the Zoo means.
 - We would recommend gathering benchmarking data about other successful models with two zoos within 75 miles and use this data to help explain how the new Baton Rouge Zoo will be uniquely Baton Rouge and enhance the entire southern Louisiana region.
- The Zoo should develop and refine the strategic business plan and estimated economic impact of the transformed Zoo. The business plan will be critical in creating confidence in both the private and public communities about the viability and sustainability of the Zoo.
- Strategically identify a list of potential partners that create "synergy" for both the Zoo and its potential partners as interviewees were passionate about the new Zoo's need to play a larger role in the community and have a larger impact through partnerships. The Zoo leadership should work to schedule opportunities to introduce the Zoo, its mission, current work and its vision to these organizations. The Zoo should also seek to learn from these potential partners what their visions are and how to share in common goals. Ideally, the Zoo and

the potential partners will identify opportunities to align their efforts and create partnerships that helps achieve their share goals and vision.

- The interviewees suggested partners including LSU and other local universities, Water Campus, Water Institute of the Gulf, Baton Rouge Chamber of Commerce and other chambers, Visit Baton Rouge, tourism and hospitality industry leaders, Superintendent of Education, school districts and the Knock Knock Children's Museum.
- To help build the case for the vision, the Zoo needs to begin much more thorough data collection about its current visitors. With a better understanding of who currently visits to the Zoo and why, the Zoo can enhance the messaging about the impact and need for the transformation. The Zoo should immediately start collecting additional data on its visitors such a zip codes, length of stay, visitor satisfaction and visitor experiences. At least quarterly and annual analysis should be done of the data collected.
- We recommend and interviewees agreed that the Zoo should prioritize engaging the community leadership in more conversations about the vision, the planning charrette(s) and actively meet with potential partners before addressing the question about location further. The consensus from interviewees is if the Zoo was to start with a blank canvas, the current location was not likely to be selected as the best site to build a zoo. Interviewees were also direct in sharing that it is likely that they would increase their philanthropic support towards this project if the Zoo were to be in a more central location that would it allow to be more accessible to the population and to building synergistic partnerships. They were less inclined to support the project at a significant level at the Zoo's current location.

It will be critical to have a clearer understanding of what the community leadership would support and what synergistic partnerships could have the greatest impact on the region before committing to a specific location.

- The Steering Committee should continue to engage their peers in conversations about the Zoos location as well as gain a better understanding of what other potential locations could be available.
- Through the Zoo's visitor surveys, questions could be asked about the Zoo's location to collect their input.
- Again as planning continues, the business plan should be further developed and detailed. Based on our experience, the cost of building a new Zoo on undeveloped land compared to renovating the existing Zoo will be very similar – minus the cost of land. There is concern from interviewees about having purchase land, especially having to use public funds to do so. There is less of concern if the potential new site/land is donated to the Zoo.
- If the decision is made eventually that the Zoo would be able to best serve the community in another location, then the Zoo leadership along

with BREC's leadership would have to work diligently to engage the communities surrounding the Zoo and create a strategic plan for the space in Greenwood Community Park that the Zoo currently occupies.

- We believe that if the Zoo follows the planning timeline outlined in this report, the Zoo can answer questions about the location within the next six to nine months.
- We would recommend the Zoo work with the community leadership and potential partnerships take place before engaging the general public in focus groups, town meetings and polling. We would envision that the initial market research and general community input would focus on the larger vision and asking the community how the Zoo can better serve them. As planning progresses and the Zoo has clearer options related to the location, then the Zoo should engage in town meetings and polling related to the larger vision and the location. There will have to be careful coordination of the public engagement and collection of their input in the planning.
- When the vision has more depth, partnerships are developed or in the works and the business plan is more solidified then the Zoo should begin preparing for raising the private support needed through a capital campaign. We believe that raising the private dollars first will be critical for creating confidence and support in voters to pass a tax initiative. The Zoo will need to create a campaign plan that prioritizes donor outreach, creates prospect management strategies and organizes volunteers and staff to engage in cultivation and solicitation. Formal campaign case statements and materials will be needed as well.

3. Funding the New Vision

The interviewees felt that the success of the Zoo's new vision would be most likely be achieved through a public/private funding model. Public/private models in the zoo industry have been very successful. There have been a number of recent successful major initiatives supported in conjunction with major private fundraising campaigns including Birmingham Zoo (Birmingham, AL), Utah's Hogle Zoo (Salt Lake City, UT), Houston Zoo (Houston, TX) and Dallas Zoo (Dallas, TX).

Unlike the Audubon Alive initiative which was going to rely primarily on public support, the interviewees felt strongly that the likelihood of success would be increased by first securing private funds before asking for the voters' support and soliciting public dollars. By sequencing the model with private dollars first, the community leadership will have an opportunity to demonstrate their commitment to the project and for the Zoo to spend time increasing its awareness in the community.

In our testing of the feasibility of raising \$25 million privately, the interviewees believed that with a bold vision and the right leadership this is achievable and possibly additional private support could be identified.

Interviewees understood that the \$110 million discussed in the vision document was an initial estimate. With the Zoo's leadership and the Steering Committee input, the Zoo will work to solidify the transformed Zoo's facility and concept plan, refine the scope of the vision and secure detailed cost estimates. The funding model will have to be reevaluated as planning progresses and a more informed funding structure will be developed. In all cases, the vision for the transformation of the Zoo and visitor experience can be accomplished with a phased funding approach.

4. Internal Capacity

The Zoo and Friends are young organizations in terms of raising capital funds from individuals, foundations and corporations. While it has successfully completed smaller capital campaigns, the Zoo will need to increase internal capacity to raise the private dollars necessary for accomplishing its vision. The operational foundation of a development program – from staff capabilities to policies and procedures to systems – is critical to ensuring that the right prospects are reached with the appropriate messages to support any engagement/cultivation effort, and that relationships deepen community engagement over time.

The Zoo Director will need to allocate over 70% of his time to this project and building relationships. It is vital that his duties in Zoo operations will need to be delegated to his staff. He will need to meet with community leaders and partners on a weekly, if not daily basis. He will also need to work with the zoo-industry experts to guide the planning for the Zoo including the master planning and business planning. He will also be overseeing the Steering Committee.

Currently, the Zoo has one individual overseeing development, membership and marketing. (This position is not a BREC employee, but a Friends of the Zoo employee.) This will need to be expanded to address increased awareness building and volunteer management. We would imagine that an external marketing/public relations partner could be used to increase the bandwidth in awareness building, communications, and media relations. It will be an increasingly larger job to manage the volunteer leadership of the Steering Committee as more and more cultivation and outreach occurs to build the prospect pool for the Zoo. Additional major gifts officers will be needed to support a capital campaign of \$25 million. Staff and/or contract resources will also be needed for donor prospect research, market research/polling, cultivation/engagement events and campaign management.

One of the most critical tools to building organizational capacity will be having a manageable and efficient database system. All identified prospects and prospect activity will need to be entered, tracked and managed through a database. The Zoo should evaluate its current system and staff expertise and resources that are managing it. If needed, the Zoo should invest in enhancing its database and building the resources needed to maintain it.

5. Zoo Awareness Building

From our experience, an organization becoming a priority in the community requires awareness, a compelling vision or story to tell and leadership. Communities rally behind and support much more passionately and generously around institutions that are top-of-mind.

As we learned in the interviews, the Zoo needs to generate more awareness, especially as it relates to the larger role that the Baton Rouge Zoo can play in the community.

Currently, the Zoo is viewed as place for young parents to take their children – a very linear view. The Zoo needs to expand how its new vision is to diversify the visitor experience making the Zoo a place for all ages. This is related to the Zoo having a more synergistic role in the community linking it to education, conservation, quality of life, tourism and economic development.

With the significant investment made recently by the Audubon Alive initiative, the general community does have some understanding about how zoos are expanding their impact in their region. The Baton Rouge Zoo needs to create that top-of-mind awareness about it and its new vision. Most importantly, the Baton Rouge Zoo needs to do this in a way that highlights how its vision is unique for Baton Rouge and the surrounding parishes.

With the scale of the Zoo's vision, the Zoo will need to build awareness on two tracks: (1) with the community and philanthropic leadership through one-on-one meetings and small gatherings, and (2) with the general public through marketing, PR and an increased media presence. The Zoo has great good news stories on a regular basis about its animals, educational impact and conservation work – these are what need to get more ongoing publicity.

It is important to be cautious about going out to the community with messages about the Zoo's vision until after significant work is done just to better introduce the community to the Zoo and create increased awareness about the Zoo, its animals, its mission and work in education and conservation.

The Zoo staff should be working to ensuring that clear messaging and talking points are developed and available for all levels of Zoo advocates including the FOZ Board, Steering Committee, Zoo staff, BREC Commissioners, BREC Foundation Board members and even loyal Zoo Friends. The community has a history of challenging and thwarting major projects that have been vague in their messaging and not fully transparent.

Next Steps in Planning - Suggested Timeline

With the momentum generated from the feasibility study and subsequent conversations, it is critical to maintain the excitement and energy about the Zoo's vision. To do so requires an accelerated and aggressive planning process. In the timeline below are the recommended next steps for the Zoo. While, it is an aggressive timeline, it is achievable and will serve to generate even more momentum. The Friends of the Zoo should continue to invest, lead and logistically manage the planning for the Zoo to ensure timely execution of the process.

Suggested Timeline	
Date	Activity
May 2015	Friends of the Zoo Meeting to present Feasibility Study Key Findings and Next Steps
May 2015	BREC Meeting to review Feasibility Study Key Findings and Next Steps
May – June 2015	Provide “Study Stakeholders” an overview of the Feasibility Study Key Findings and Next Steps
June 2015	Develop and launch Zoo visitor surveys and collect basic visitor information
June 2015	Recruit Steering Committee; ongoing process
July 2015	Outline key message points (FAQ) to share with key stakeholders and friends
July – Sept 2015	Engage a zoo planning firm to manage a design charrette and develop a concept facility plan
July – Dec 2015	Engage potential partners with the Zoo through introductory and cultivation meetings
Aug – Oct 2015	Develop a strategic business plan that frames the business goals to support the concept facility plan and defines a sustainable funding model for the new concept facility plan
Aug – Nov 2015	Assess site location options and opportunities
Sept – Oct 2015	Develop communications and cultivation plan to “rollout” the concept facility plan and strategic business plan findings, recommendations and next steps
Oct – Dec 2015	Begin fundraising campaign preparation and increasing internal capacity for awareness building and fundraising

Appendix A

Interview Invitation Letter



**FRIENDS OF THE
BATON ROUGE ZOO**
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Baton Rouge, LA 70807
Phone: 225.778.4009
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www.brzoo.org

BOARD OF DIRECTORS

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Scott Hensgens
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Cheryl Olinde
Mary Lou Potter
Nadine C. Russell
Joseph Simmons
Chris Stelly
Phil Frost – Ex Officio
Zoo Director

February 13, 2015

Name
Address
City, State Zip

Dear Potential Interviewee,

We're pleased to say that at the onset of the new year, the Baton Rouge Zoo has already been hard at work improving animal exhibits, expanding the reach of educational programs and increasing our role in international animal conservation. We have developed a compelling new vision to dramatically re-imagine the visitor experience through significant renovations to the Zoo and envision the Baton Rouge Zoo as an even stronger dynamic cultural and community asset for all to enjoy.

To help us frame our strategic roadmap and implement this new vision, we are engaging approximately 25 key community, business, philanthropic and political leaders in a conversation around the options and opportunities for a "new" Zoo. With the financial support of Friends of the Baton Rouge Zoo, we have retained the consulting firm of Schultz & Williams to conduct a feasibility study to test and validate the Zoo's potential to move forward with this dramatically re-imagined Zoo.

We are writing to invite you to take part in this extremely important process. Specifically, Schultz & Williams' Vice President, Rick Biddle, and Consultant, Jill Macauley, would like to meet with you to seek your advice, guidance and response to our plans. We anticipate needing no more than 45 minutes of your time.

Your comments will be kept confidential and will be used as background for the Schultz & Williams' recommendations on how we should proceed. We'd like to stress that this interview is not a solicitation; rather, it will be an opportunity for you to share with the Schultz & Williams team your honest thoughts and feedback regarding our vision and the future direction of the Baton Rouge Zoo.

Kaki Heiligenthal, Director of Marketing and Development for Friends of the Baton Rouge Zoo, will contact you shortly to arrange a mutually convenient time for your interview. Once an interview is scheduled, a packet of information will be sent to you in advance of the meeting to help prepare you for the discussion.

We thank you in advance for your time, interest and valuable perspective.

Sincerely,

Phil Frost
Zoo Director
BREC's Baton Rouge Zoo

Jim McIlwain
President
Friends of the Baton Rouge Zoo Board of Directors

Carolyn McKnight
Superintendent
BREC

List of Interviewees

BREC's Baton Rouge Zoo
Feasibility Study

List of Interviewees

Joel Baines, VMD, PhD
Dean
LSU School of Veterinary Medicine

Annette Barton
Community Volunteer

Scott Berg
Market President, Baton Rouge
Lee Michael's Fine Jewelry

Lori Bertman
President and CEO
Irene W. and C.B. Pennington Foundation

Daniel Bevan
President, CFO, Treasurer & Trustee
Huey and Angelina Wilson Foundation

Dennis Blunt
Partner
Phelps Dunbar, LLP

Tee Brown
President
GMFS

Steve Carter
State Representative, LA 66th District
Louisiana House of Representatives

William Daniel
Chief Administrative Officer
Office of the Mayor-President of East Baton
Rouge

John Davies
President and CEO
Baton Rouge Area Foundation

Franklin Foil
State Representative, LA 70th District
Louisiana House of Representatives

Perry Franklin
President and Principal in Charge
Franklin Associates

Garret Graves
State Representative, LA 6th District
Louisiana House of Representatives

Todd Graves
Founder, Chairman and CEO
Raising Cane's Chicken Fingers

Gwen Hamilton
Interim CEO
East Baton Rouge Redevelopment Authority

Marvin "Kip" Holden
Mayor-President
East Baton Rouge Parish

Dr. Kim Hunter-Reed
Senior Associate
HCM Strategists

Kathryn Kissam
Community Volunteer

Adam Knapp
President and CEO
Baton Rouge Chamber of Commerce

Charlie Lamar, III
President, Board of Directors
The Charles Lamar Family Foundation

Charles Landry
Partner
Fishman Haygood

Mickey Parenton

Senior Vice President of Operations
and General Manager
Pinnacle Entertainment L'Auberge Casino &
Hotel in Baton Rouge

Bob & Sue Rainer

Partner/Community Volunteer
Rainer Anding Talbot & Mulhearn/NA

Kimberly Robinson

Partner
Jones Walker Law Firm

Dr. Christel Slaughter

Partner
SSA Consultants

John F. Smith

Consultant
The Godfrey Center for Creative Strategies

Roland Toups

Chairman & CEO
Turner Industries

Mike Wampold

Chairman and CEO
Wampold Companies